

Say Hello to the Snapchat Generation

The Real Story in The US



ENGINE

CASSANDRA

Who is the Snapchat Generation?	05
How do they Communicate?	17
How do they Shop?	25
How do they Relate?	32
How do they Play?	41

Key Findings



From an early age, the Snapchat Generation has stepped up to be the change makers they believe the world needs. They harness their **creativity, empathy and the digital tools** at their command to make an impact on the causes and issues that matter to them.



The Snapchat Generation expects to have a two-way relationship with their favorite brands. Brands who share their **origin stories, secrets to their success and align themselves with this generation's social causes** will be rewarded with loyalty and an eagerness to show their approval by showcasing the brand's logo.



The pressure to excel, combined with a heaviness of the world in which they have come of age, has this cohort more stressed than prior generations. They respond by seeking out moments of **levity and have a strong desire to bring fun** back into their everyday. This need for laughter and silliness will continue into their future as a tool to keep them recharged.



As a result of the pandemic, the Snapchat Generation has a renewed appreciation for friends and family and will carry this deep **need for connection** through as a defining characteristic.

In the US, a diverse and socially conscious Generation

The Snapchat Generation in the US have the **highest discretionary spending power (\$1.9 Trillion)** of any country or region. They are willing to spend twice as much on key categories (new cellphone +50%, online classes +50%, and new shoes +64%) than non-Snapchatters, especially if they are able to use those items in a way that plays into their creativity, connection to others, and skill building.

The US is extremely diverse, and the Snapchat Generation is even more so. They want clothes and accessories that help them **show their personal identity**, and also **showcase brands that support the causes they stand for and care about**. They feel it's important to show their real selves, both IRL and online.

They see digital media as a way to not only connect with their family and friends, but to use it as a tool that helps them **change the world**. They know that they have the power to rally large numbers of people to take action and will post about the social causes and issues online that they care about. This generation knows they can have the world's attention one click or post away, and are ready to use that position for good.





01

**Who is the
Snapchat
Generation?**

They are diverse & value inclusivity.

In the US, the Snapchat Generation is 2x more likely to be Black, almost 3x more likely to be Hispanic or Latino/a/x, and 4x more likely to be multi-racial than older generations.

3 out of 4 in the Snapchat Generation say being inclusive describes them and are more likely than non-Snapchatters to say they and their friends are inclusive of people who are different.

They are wise & worldly.

8 out of 10 say they are informed about world events and news. They are 1.3x more likely than non-Snapchatters to say that they volunteer, they give back through charity and roll up their sleeves to drive social change.

They are real & playful.

7 out of 10 in the Snapchat Generation say they want their online image to represent the "real me" (compared to only 6 in 10 of non-Snapchatters). Yet, the Snapchat Generation is playful when it comes to their online presence, they are 2.2x as likely as non-Snapchatters to say they usually edit or use a filter on photos of themselves as they see this as an expression of their creativity.



In the US, the Snapchat Generation is multi-dimensional

This generation is multi-faceted, and take a much more holistic and nuanced view of how they define themselves, from the music they listen to, to the influencers they follow, to the clothes they wear. They see being kind as cool, as is working hard and expressing their creativity.

The Snapchat Generation is more likely than both non-Snapchatters and older generations to agree that all of these are key aspects of their personality.

Music I listen to



Clothes I wear



mental health
physical health

My room/home



Cooking/the food I eat

Videos/shows/movies I watch | Causes I care about

Clothes I wear

Sports I play/follow Games I play



The content I create/share online | My makeup/cosmetics/grooming



The art/work I create | My activism | Car I drive | Influencers I follow

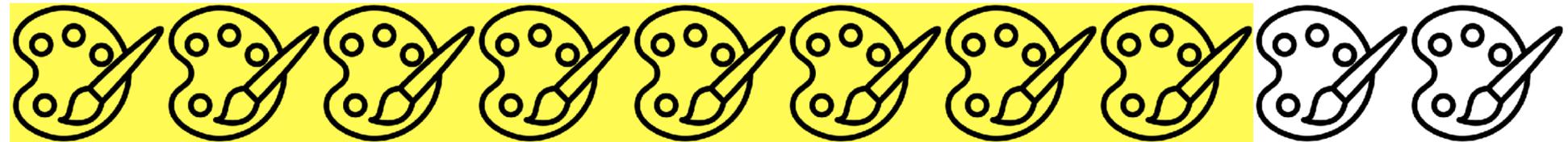
School I attend | Tattoos/Piercings I have

The technology I use | My hairstyle

The Snapchat Generation in the US is more likely than Gen Z to view themselves as kind, creative, hard working, and independent.



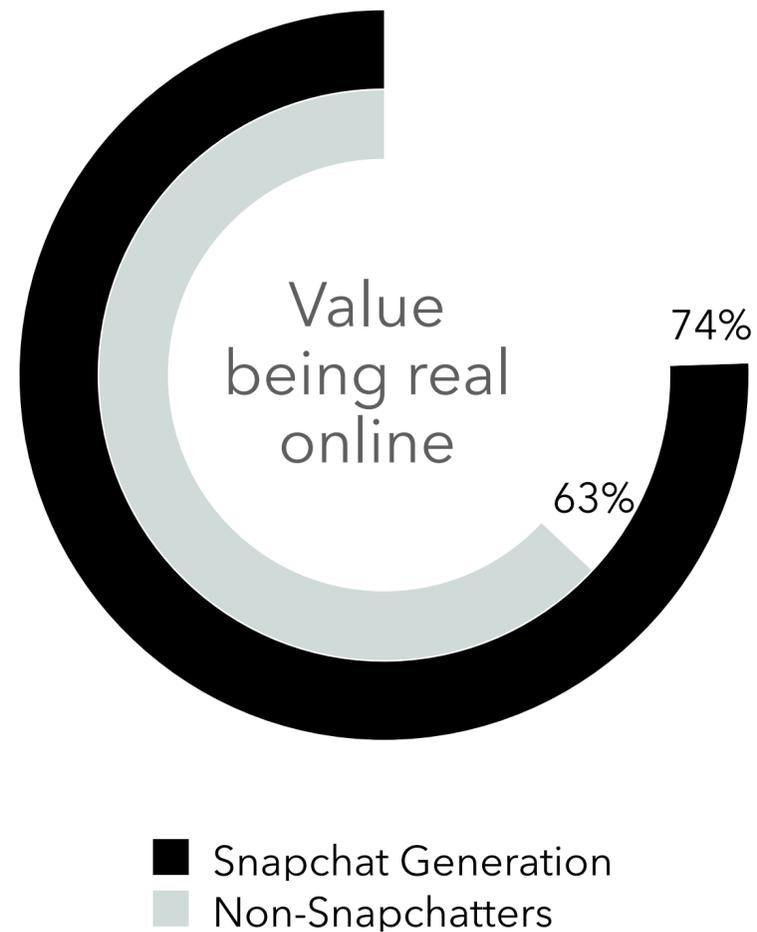
9 out of 10 in the Snapchat Generation describe themselves and their friends as **kind**.



8 out of 10 describe themselves as **creative**.

I want to be ME

This generation doesn't have the time to be fake. They want to be recognized, seen, and heard for who they truly are and they want their presence on digital media to reflect their true selves.



8 in 10 say 'It's important to me to be true to myself'

9 out of 10 in the Snapchat Generation agree,

**“It’s important to me to
form my own opinions
(i.e., without the
influence of others)”**

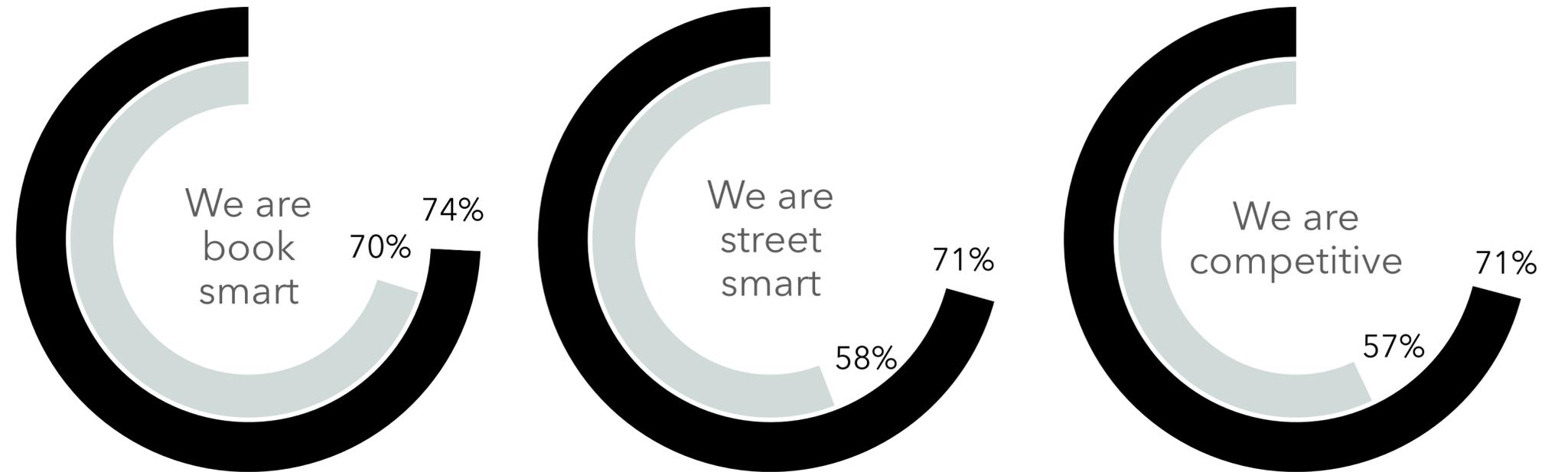


A drive to excel

From an early age, The Snapchat Generation was raised to work hard and taught the value of grit and determination. Seeing themselves as both street *and* book smart, the Snapchat Generation is driven to be significant. Seventy-one percent see themselves as “competitive” 14 pts higher than non-Snapchatters.

Self and Friend Descriptors

Completely/Somewhat Agree Summary



■ Snapchat Generation
■ Non-Snapchatters

But at what cost? Stress.

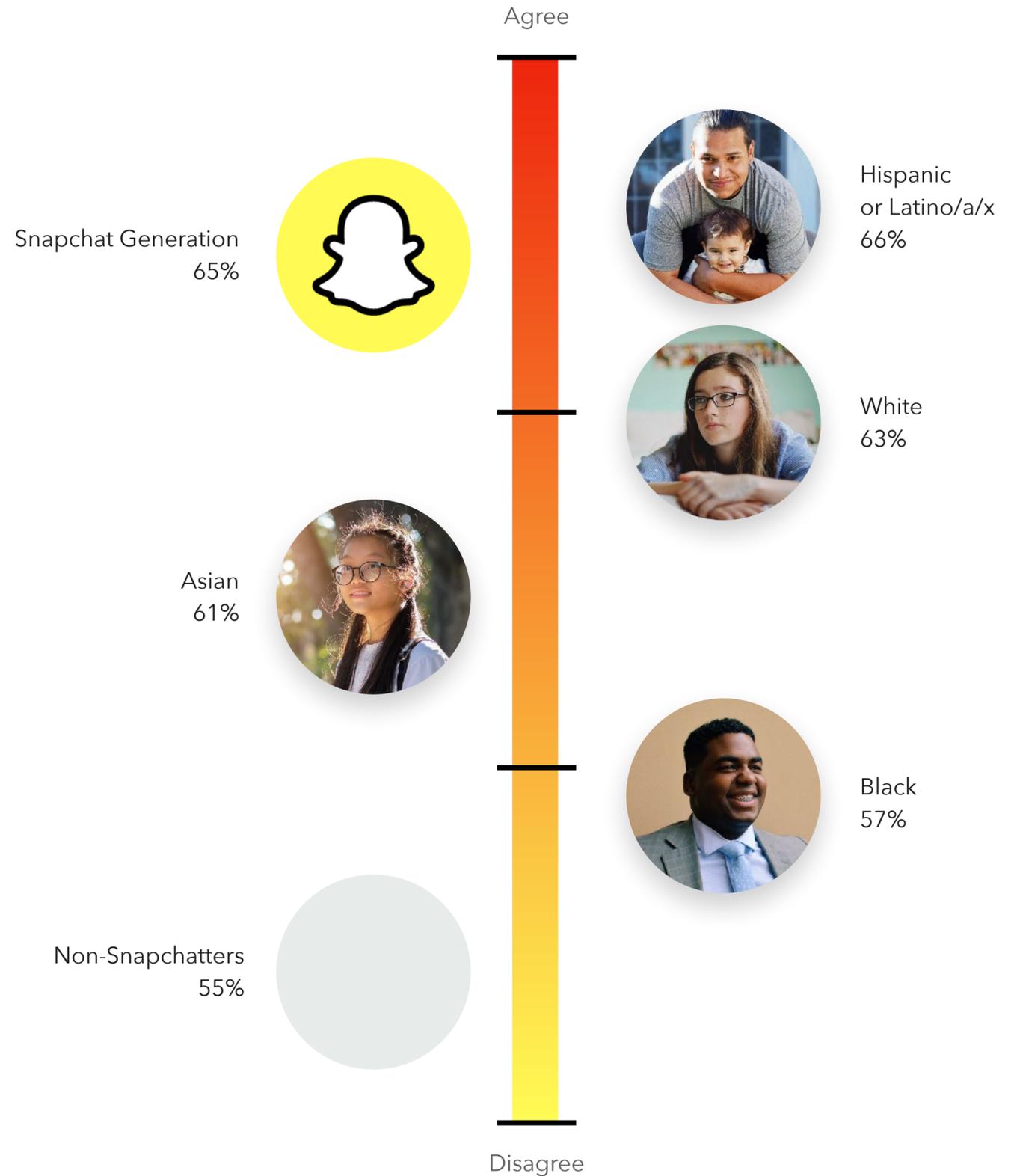
The pressures to excel and change the world, coupled with the world they are living in (social injustice, political division, terrorism, climate change, and now a pandemic) inevitably lead this generation to be stressed out.



"I feel expected to act like an adult before I even become one."

7 out of 10 in the Snapchat Generation (65%) agree vs 6 out of 10 non-Snapchatters (55%).

This sentiment varies among total population ethnicity – white 63%, Hispanic or Latino/a/x 66%, Asian 61%, and Black/African American 57%.



76% of the Snapchat Generation in the US feels stress on a weekly or daily basis

(v. 67% for non-Snapchatters)

While the Snapchat Generation and non-Snapchatters are equally stressed about Covid/the pandemic, the Snapchat Generation is more stressed than non-Snapchatters when it comes to money (1.15x), school/work (1.3x), sleep (1.2x) and health/fitness (1.2x).

TOP CAUSES OF STRESS

#1	Covid-19/the pandemic (63%)
#2	Money (58%)
#3	School/work (48%)
#4	Not getting enough sleep (48%)
#5	My health/fitness (39%)

Even with all the stressors in their lives and after an extraordinarily difficult year, this generation is feeling more:



Comfortable

(1.6x vs. non-Snapchatters)



Hopeful

(1.3x vs. non-Snapchatters)



Happy

(1.6x vs. non-Snapchatters)



Excited

(1.6x vs. non-Snapchatters)



Fulfilled

(1.4x vs. non-Snapchatters)



Moving through life with determination and optimism.



8 in 10

say they feel like they have control over their lives.



7 in 10

are confident that they can make it through life on their own.



3 in 4

feel optimistic as they work to build a better world and a personally fulfilling life for themselves.



02

How do they
communicate?

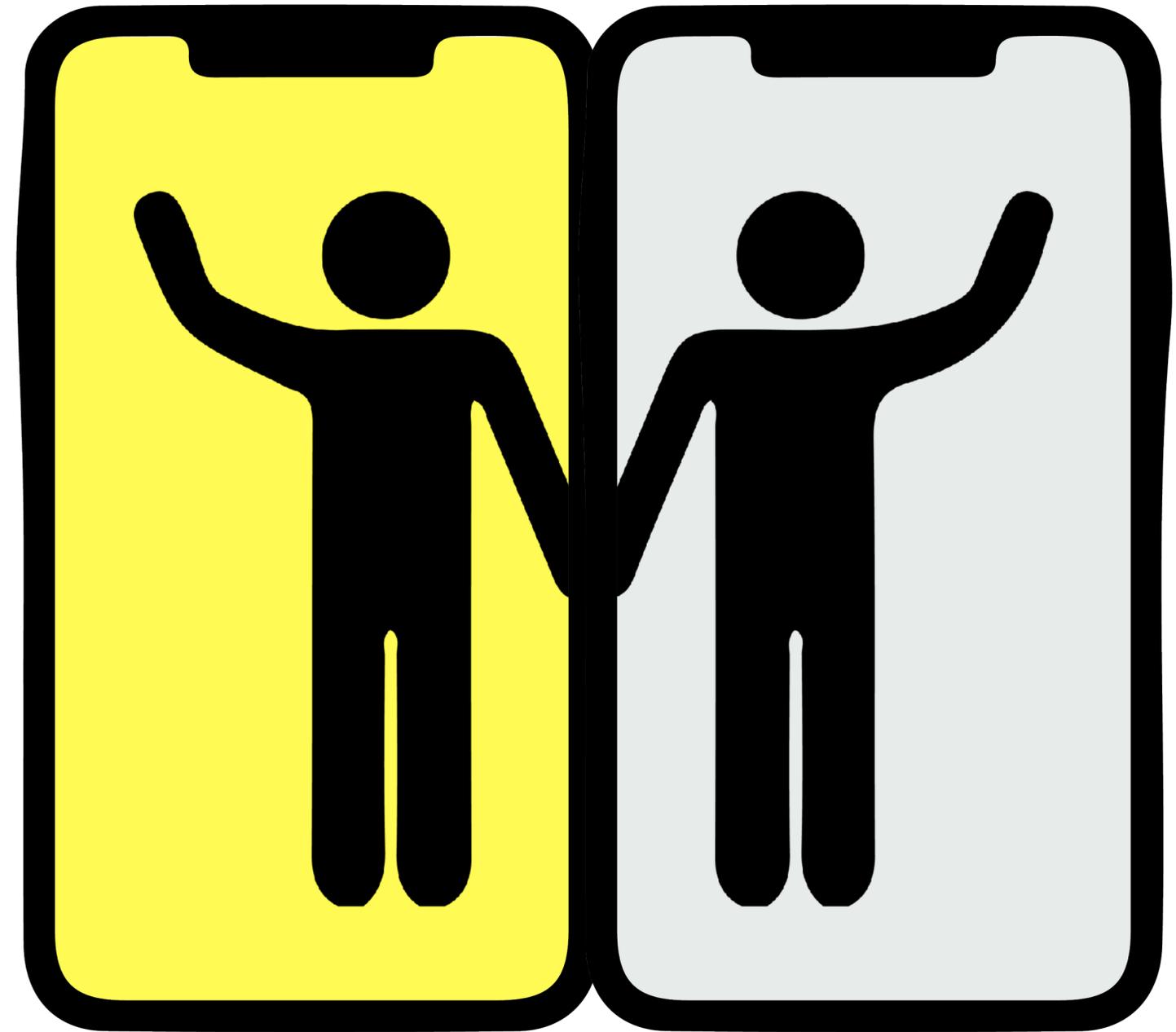
"My phone keeps me connected to everyone that matters to me. From friends I met in kindergarten to a guy I met last night. I get to stay connected to them all if I want."

– Kelsey, 17, US



1 in 2 of the Snapchat Generation in the US feel digital platforms connect them with others

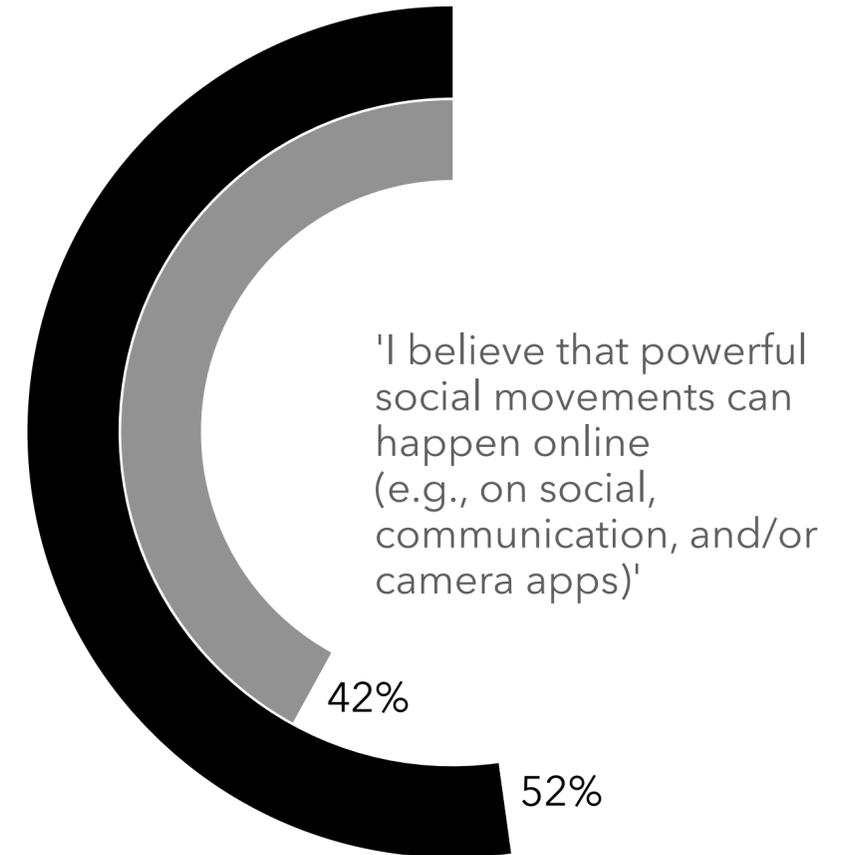
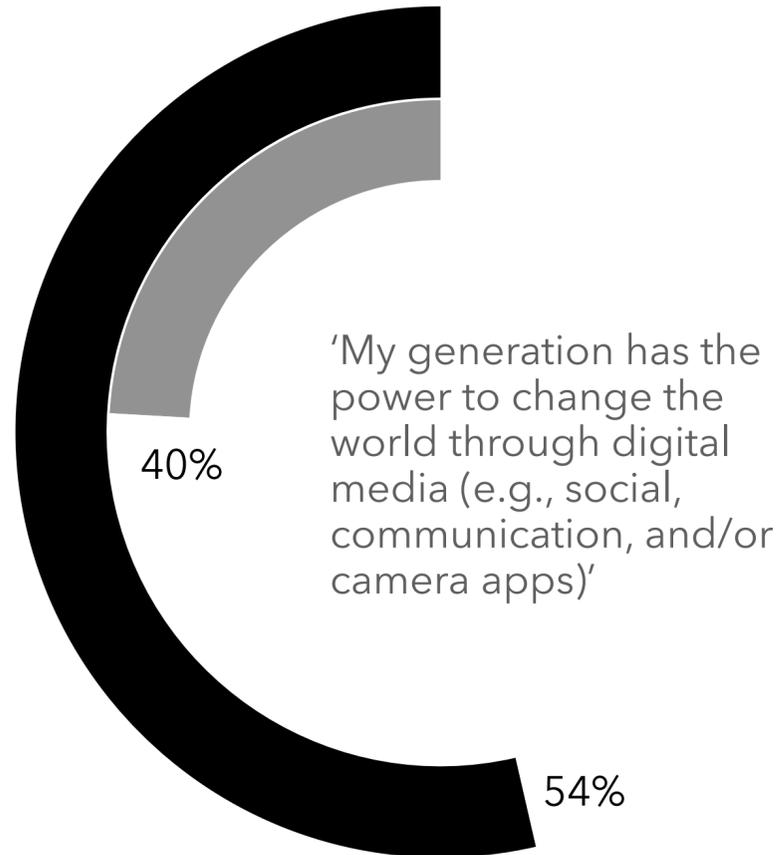
+26 pts from Non-Snapchatters



Digital tools

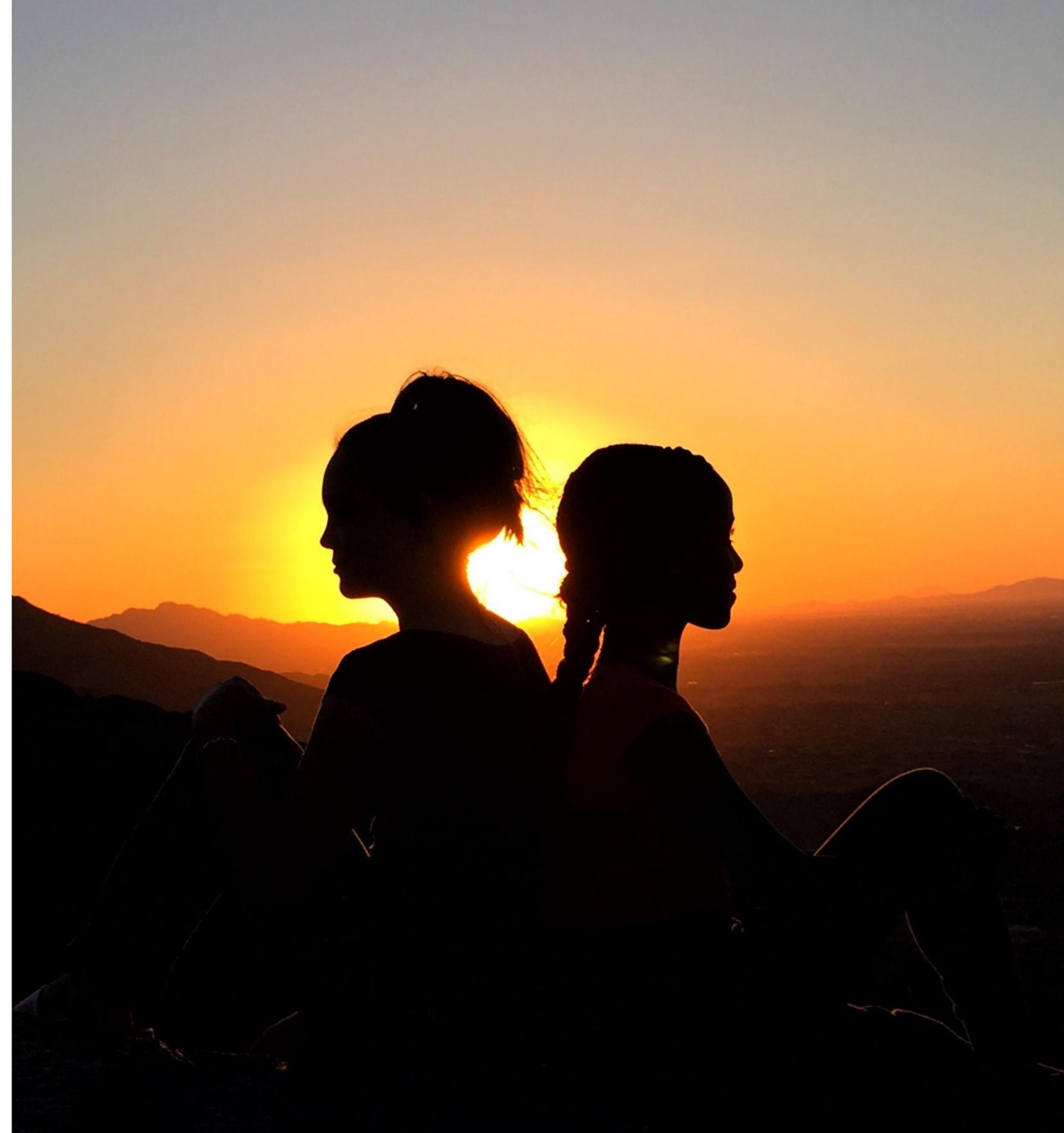
The Snapchat Generation feels significantly more empowered than Non-Snapchatters to **change the world** through online, digital communication which helps fuel their drive for activism and volunteerism. They know that such tools enable them to rally large numbers of people who share in their collective thinking, and in turn lead to a better world offline.

- Snapchat Generation
- Non-Snaphatters



In the US, Gen Z are 2x more likely than those in Older Generations to say

"I can't be friends with someone who doesn't care about the social issues that matter to me"



An Opportunity:

They could use help figuring out where to focus their efforts as many feel overwhelmed by the number of social issues that need to be addressed



1 in 2 of the Snapchat Generation say 'I am overwhelmed by the number of social issues that need to be addressed'

Women in the Snapchat Generation are 1.3x more likely to agree with this statement than men

1 in 2 of the Snapchat Generation say they are less likely to buy from a brand that chooses to promote the opposite side on social issues that matter to them

+6 pts from Non-Snapchatters





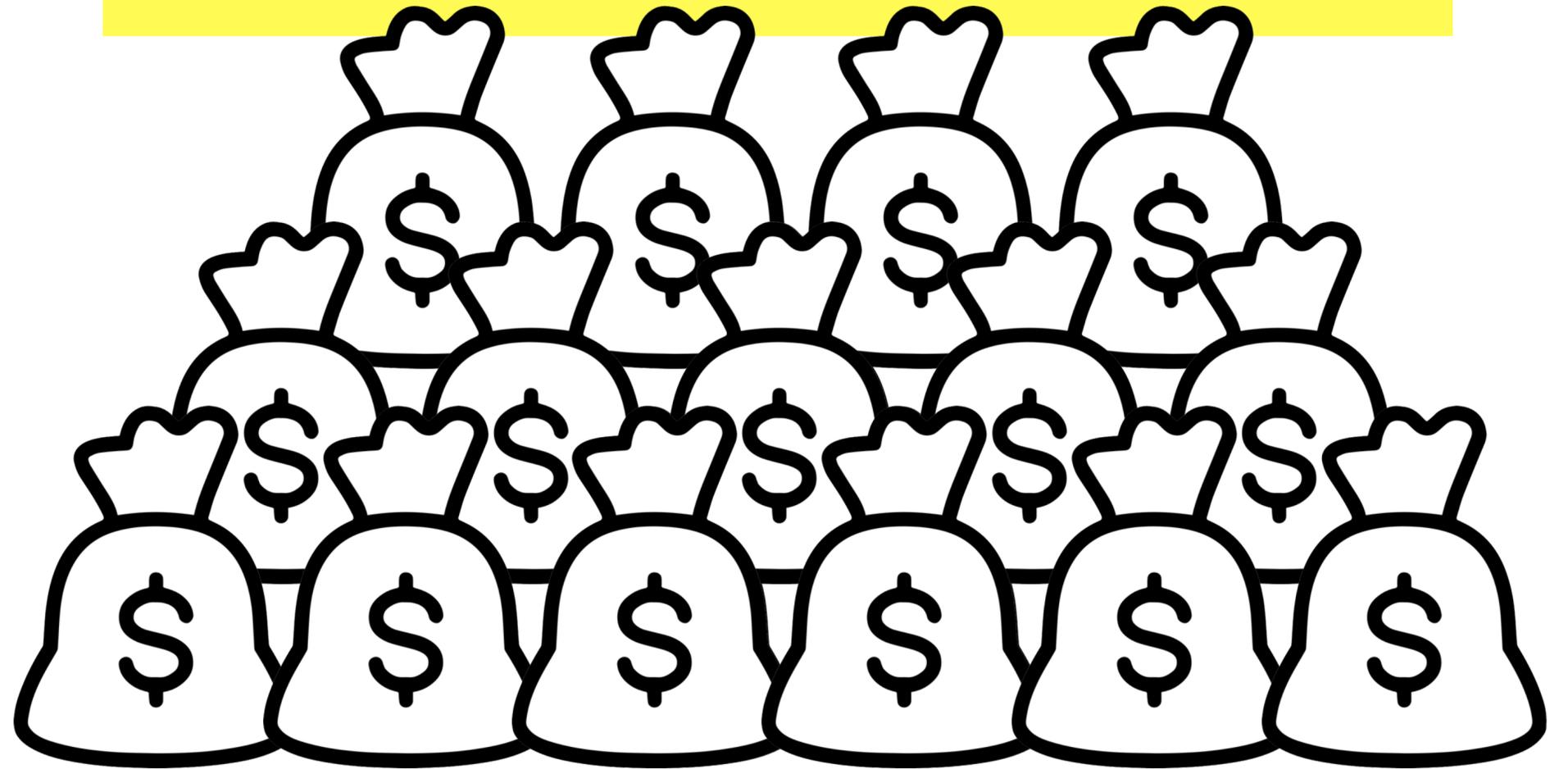
03

**How do
they spend?**

\$1.9 Trillion

Let's Get Spending

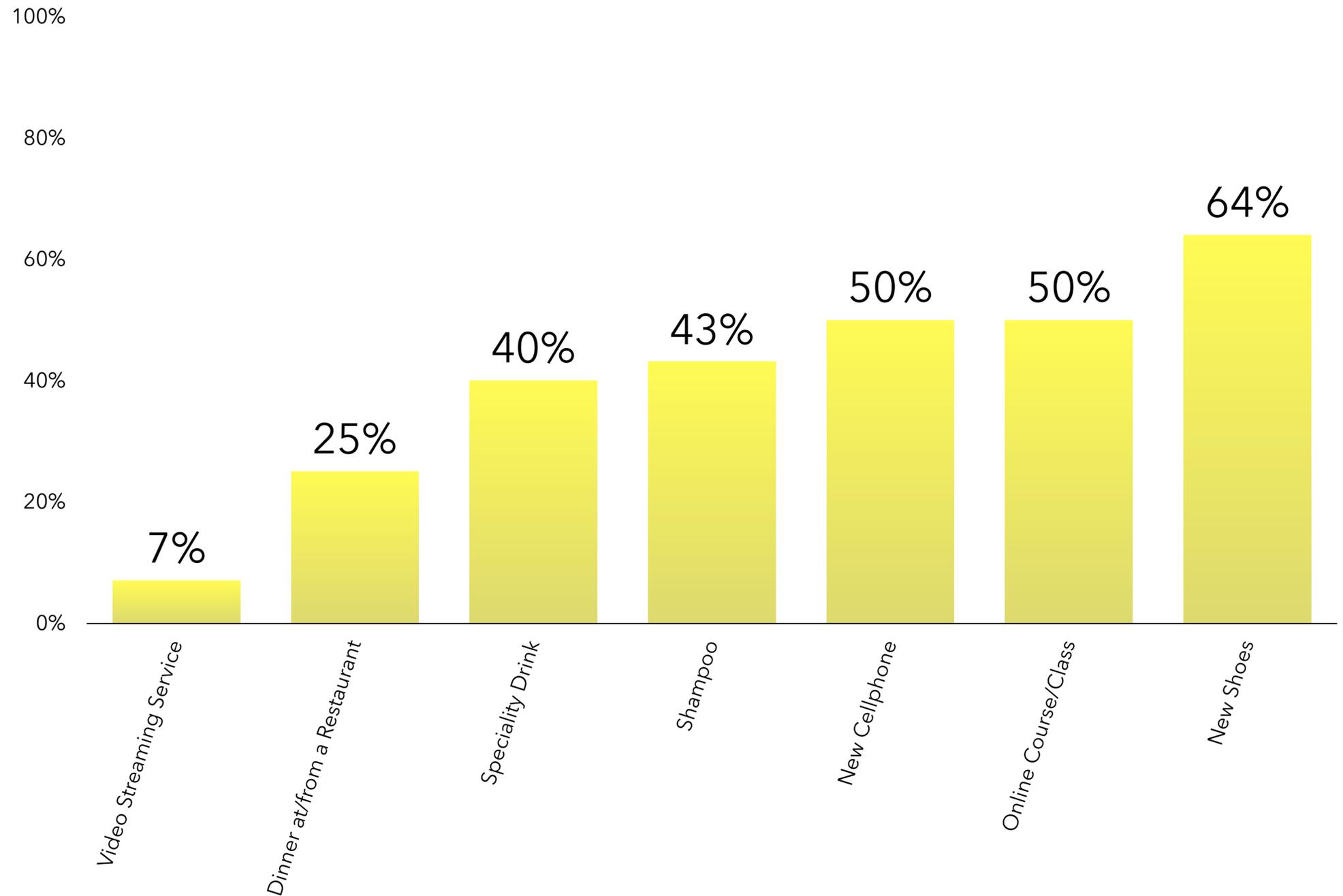
Discretionary spending power for the Snapchat Generation in The US reaches a whopping \$1.9 trillion.



The Snapchat Generation is willing to outspend non-Snapchatters

In key categories, the Snapchat Generation in the US is willing to spend more of their money on discretionary items than non-Snapchatters.

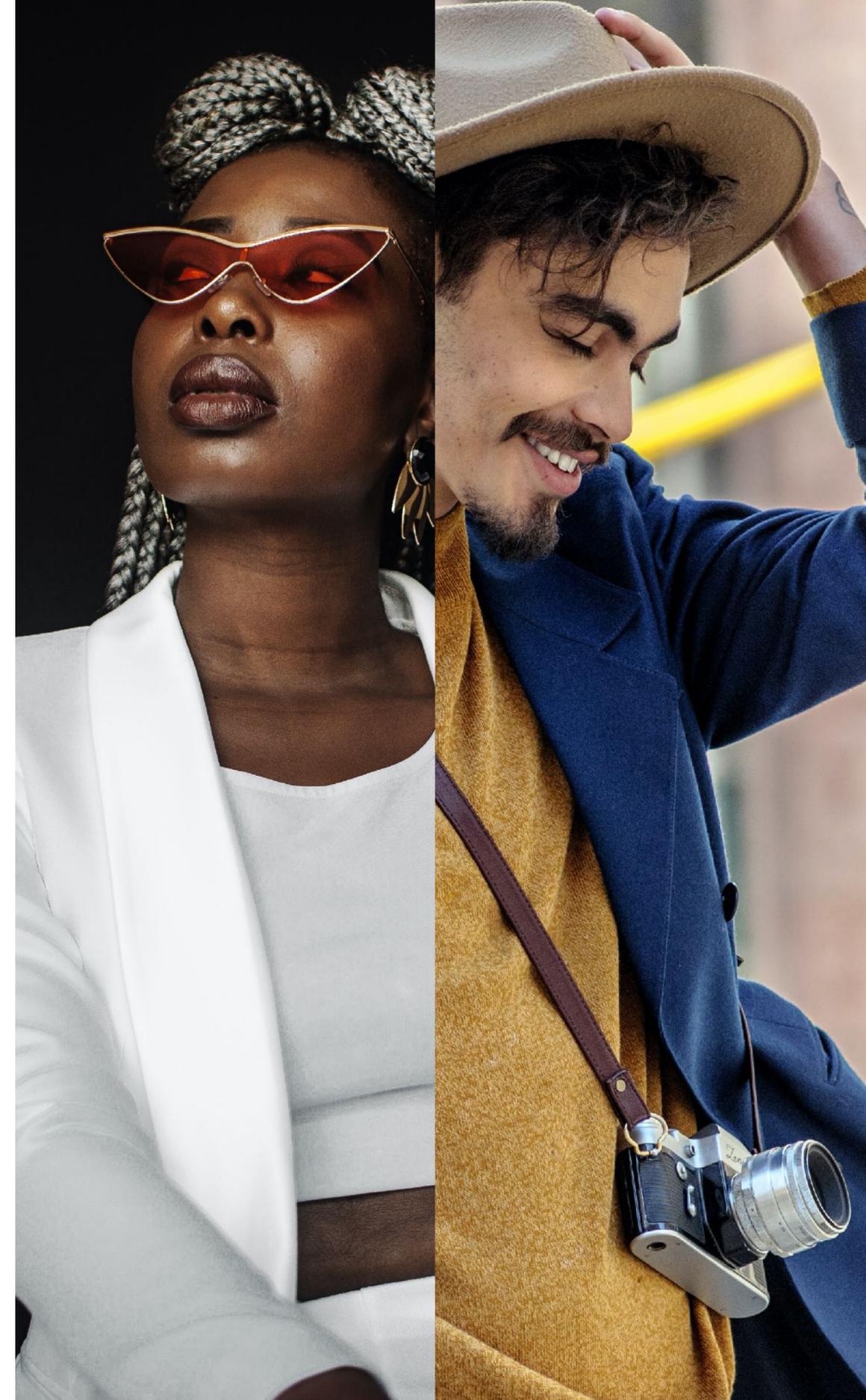
How much more the Snapchat Generation is willing to spend vs. non-Snapchatters by category



The Snapchat Generation will show loyalty by showcasing their favorite brands' logos.

The Snapchat Generation is more likely than non-Snapchatters to...

- Agree that they like to have clothes and accessories that have brand logos on them (+19 pts)
- Say wearing brand logos helps me show my personal identity (+15 pts)
- Say it is important to me to have brand name items (+19 pts)
- Say wearing brand logos means that I agree with what the brand stands for (+9 pts)
- Prefer distinct, recognizable items (e.g., a t-shirt with a logo on it) (+11 pts)





The Snapchat Generation has a highly entrepreneurial spirit and already strives for financial independence

Differences by total population ethnicities are shown to the right.

9 in 10

say it is important to be financially independent

1 in 2

say they want to be self-employed.

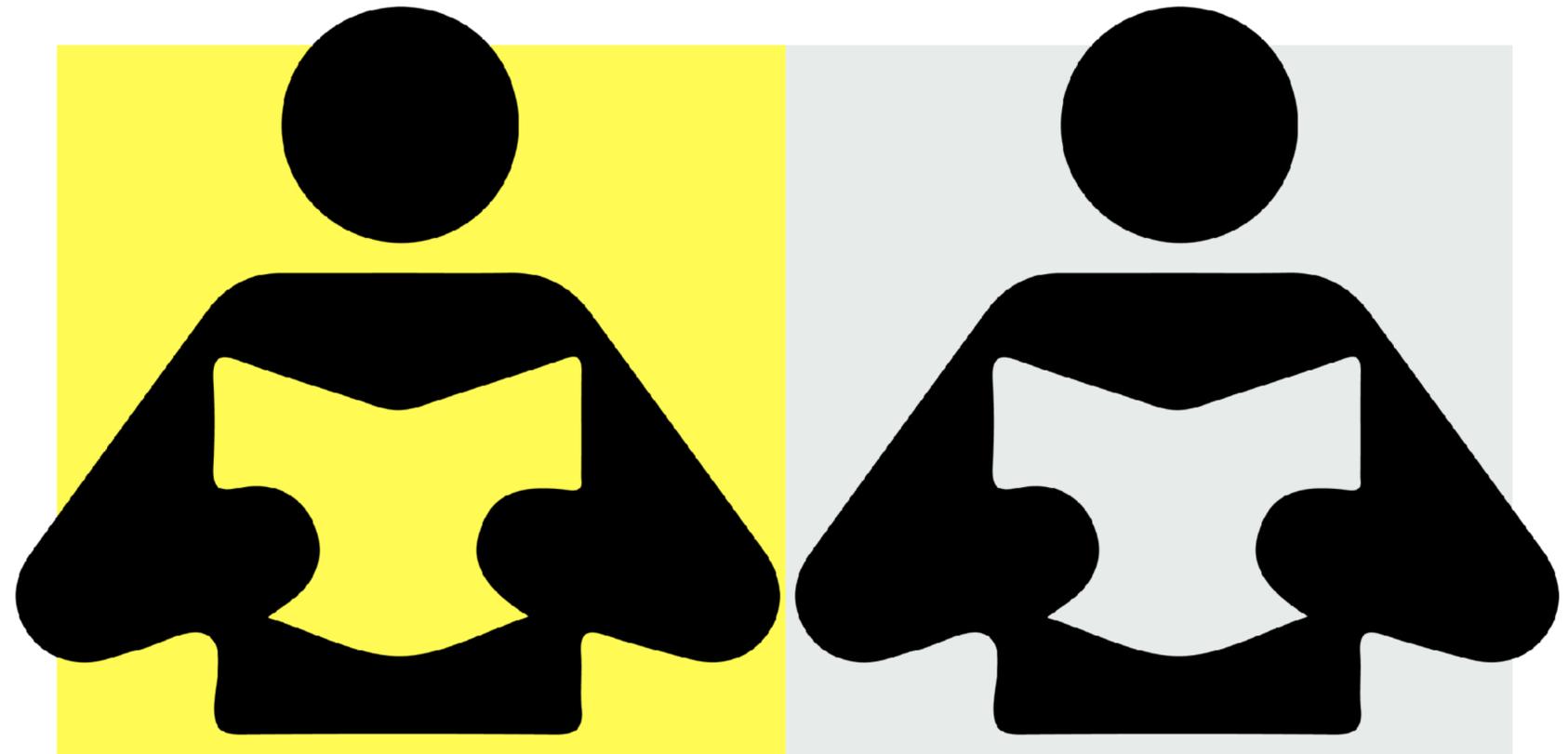
Highest among Black/African Americans (67%) than any single ethnicity.

"I'd like to work for a start up company. I'd like to be in on the beginning and even though there's a chance it won't go as planned, if it does, the results could be amazing. I'd like to be part of that."

—Kelsey, 17, US

Brands have an opportunity to connect with the Snapchat Generation

Because they are so entrepreneurial themselves, they want to hear the origin stories and compelling background stories about the founders of their favorite brands. Brands who establish this two way relationship may be rewarded with loyalty.



1 in 2 say they like to learn the backstory of brands & products that they buy, 1.4x that of non-Snapchatters

Next Gen Shopping: Leading on Using Augmented Reality

The Snapchat Generation is 5X more likely than non-Snapchatters to say they are using AR to try on products more than they did one year ago.

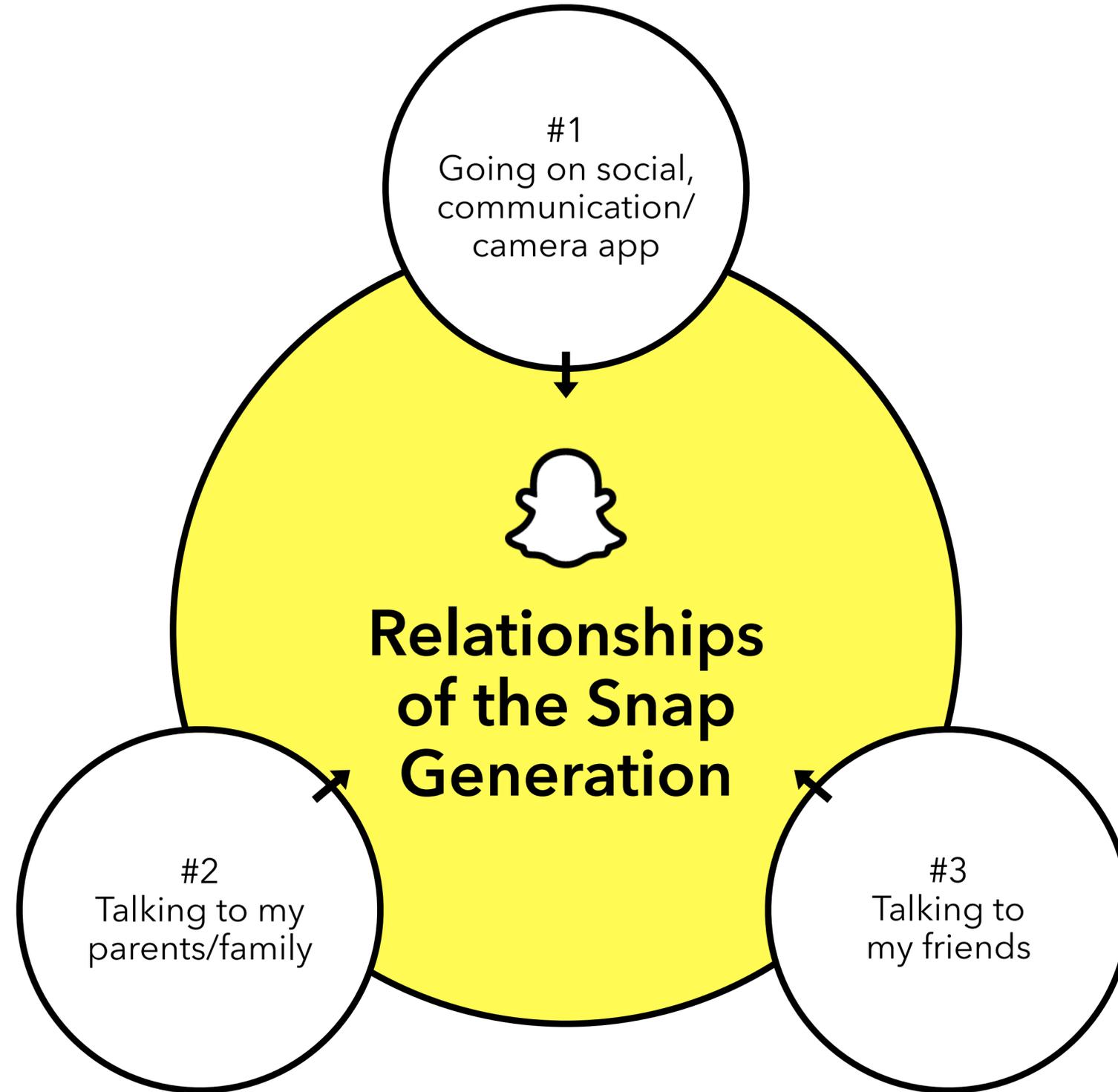




04

**How do
they relate?**

Top 3 things the Snapchat Generation can't go a day without...



The Snapchat Generation places tremendous value on their relationships with family and friends and communication/camera apps are key to keeping those relationships strong.

The value they place on those relationships has only grown stronger since the pandemic...



"My parents are my role models... my mom has been my unconditional support from day one... encouraging in all of my ventures, allowed me to make my own mistakes and learn from them. She made me work for what I received and spoiled me with love and showed me the world is generally a good place."

– Connor, 18, US



The Snapchat Generation will emerge from the pandemic with a stronger appreciation of family

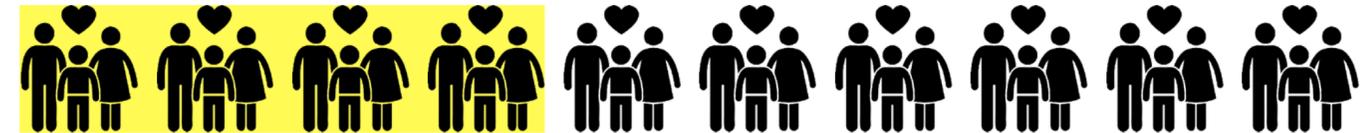
Because this renewed focus and appreciation on friends, family, and relationships is happening during their formative years, it will likely carry forward into adulthood and become a new, defining characteristic for this generation.



7 out of 10 are spending more time with their families during the pandemic



4 out of 10 have gotten closer to their families during the pandemic (1.4x more than non-Snapchatters)



4 out of 10 are friends with/follow their parents on social, communication, camera apps (1.6x more than Non-Snapchatters)

“I can’t wait to go on trips again with my friends.”

We’re planning trips to the mountains to snowboard, to Vegas and to the beach to go surfing...anywhere as long as we’re together again.”

– Daphne, a member of the Snapchat Generation, age 21, US

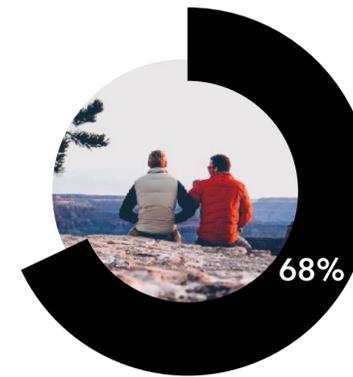
#1 Reason the Snapchat Generation uses Snapchat is to stay connected with friends.



Relationships skills will build future career success

The Snapchat Generation in the US sees their career success in the form of relationships and mental toughness. Being a hard worker is already ingrained in who they are, so their focus on the personal aspect of connecting with others will only help propel them to succeed.

Factors of Career Success As Defined by the Snapchat Generation



Good listener
(vs 65% Older Gens)



Good at working with different types of people
(vs 62% Older Gens)



Flexible/ open to change
(vs 60% Older Gens)



Mentally/
emotionally strong
(vs 59% Older Gens)



Good at speaking/ writing
(vs 48% Older Gens)



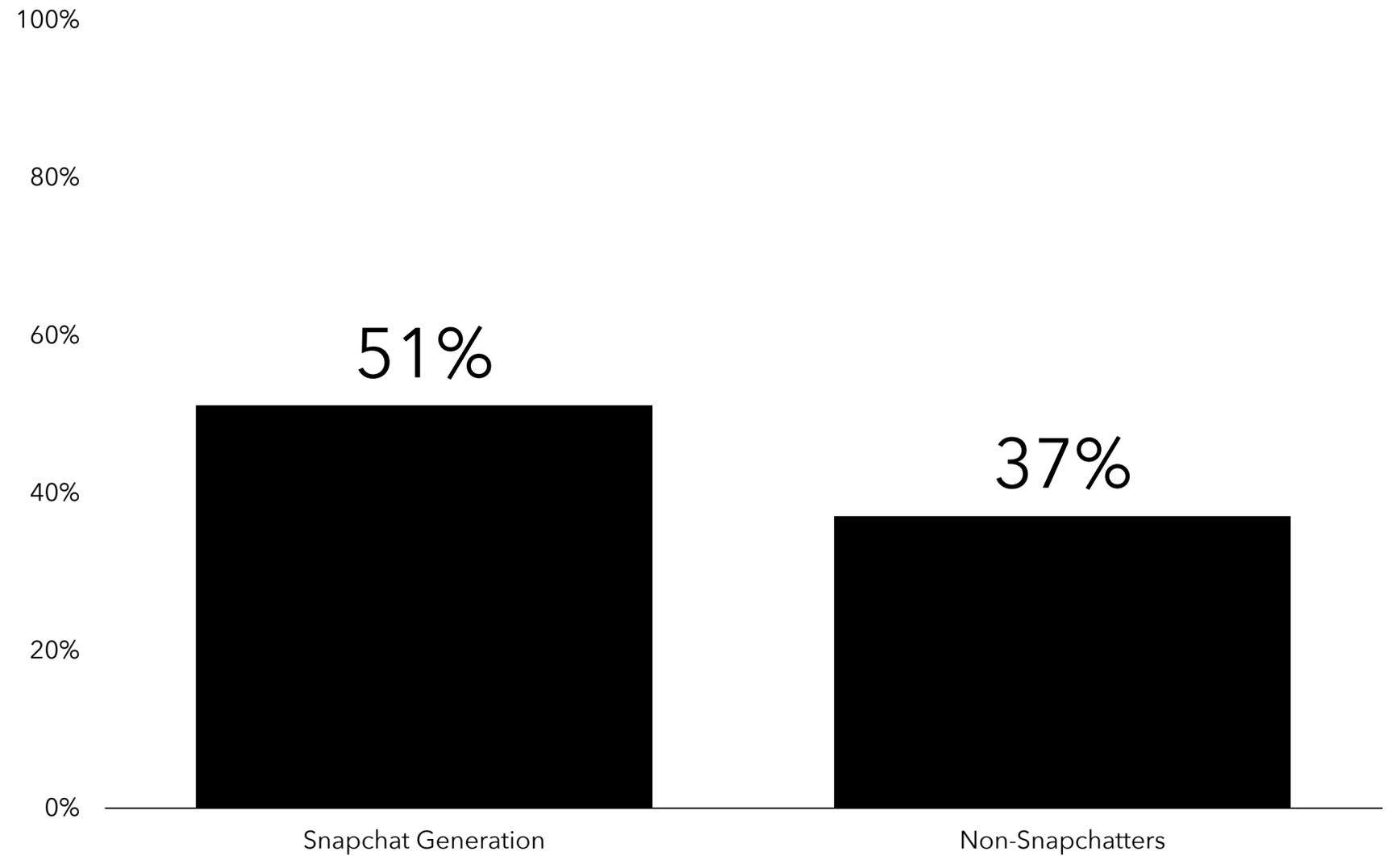
Knowing how to use latest technology
(vs 46% Older Gens)

When you know better you do better

The Snapchat Generation is taking in information from a variety of sources which leads to a constant evolution and growth of who they are and their values. They want their online image to reflect the most up-to-date version of themselves. They are 1.4x more likely than older generations to delete a post that no longer reflects their values.

Posting Online Completely/Somewhat Agree Summary

■ I delete things I've posted online if they don't reflect my opinions/values anymore





The Snapchat Generation in the US is 155% more likely than non-Snapchatters to prefer the use of **pictures over words** when communicating

TOP 5 ITEMS USED IN DIGITAL COMMUNICATIONS

#1	Photos (84%)
#2	Emojis/emoticons (77%)
#3	Memes (63%)
#4	Videos/video messaging (63%)
#5	Video calling (61%)

2021 Global Cassandra Study commissioned by Snap Inc. | Base: Total The US N=2,250 respondents

Q: Which of the following, if any, are true for you? Select all that apply. | Q: What portion of your digital communication includes images and media (e.g., emojis, photos, memes, video calls) versus text only (i.e., only words)? Please enter a percentage for each, your total must add up to 100%. If you do not communicate in one of these ways, please enter zero | Q: Please place the following items in order of those you use the most to those you use the least in your digital communication.



05

How do
they play?

The Snapchat Generation is seeking out moments of levity, joy, silliness, and plain old fun in order to recharge.

This includes the entertainment they consume, the digital media they depend on, and the hobbies they're taking up as they spend more time than ever at home. They are channeling their energy into creativity and connection, building skills and confidence that they will carry with them into the future, all while having a good time.

7 in 10 in the Snapchat Generation are making more time to just rest and relax.

"I've definitely been watching more chill shows and lots more comedies. The dumber the better. Life is hard but we don't have to take everything so seriously all the time. It's good to laugh once in a while."

—Victor, 17, US



Making the everyday fun

This creative generation, has more interests and hobbies that bring them joy than non-Snapchatters. This shows their positive outlook on life and ability to find fun in all they do. In particular, the Snapchat Generation is more likely than non-Snapchatters to say that routine activities such as fashion (1.4x), grooming (1.5x) and food (1.1x) provide them with joy.



8 out of 10

In the Snapchat Generation think cooking & eating is fun



7 out of 10

Feel that self-care and grooming are fun



6 out of 10

Say dressing up is fun

1 in 2 of the Snapchat Generation agree that gaming is a productive activity (1.2x more likely to agree than non-Snapchatters)

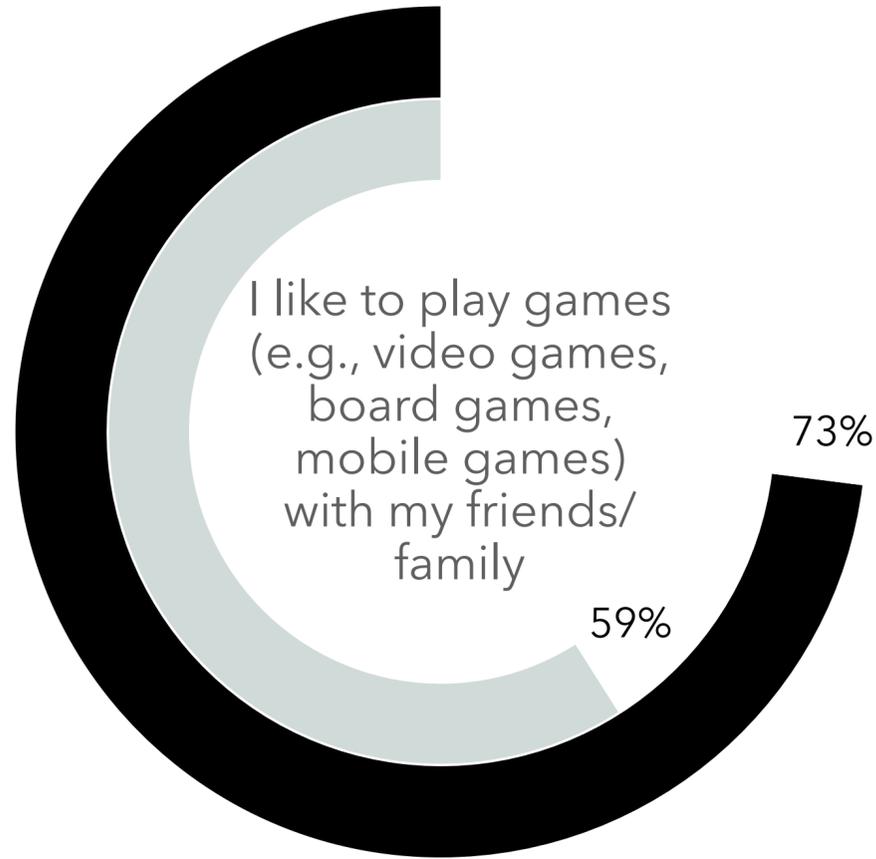
Gaming can create a fun way to learn new skills such as a new language or how to train parts of your brain not typically used.



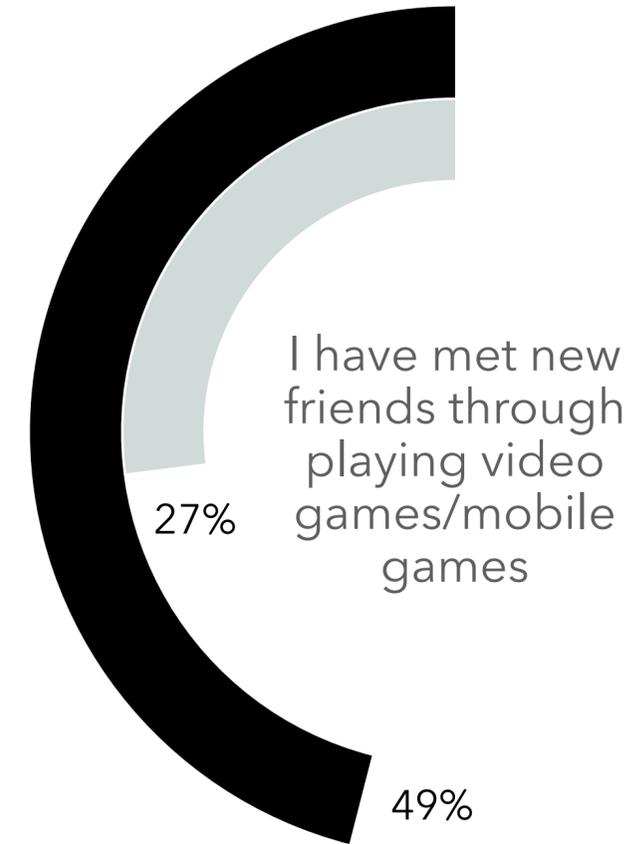
Community Through Gaming

In the US, the Snapchat Generation **flocks to gaming as a way of spending time with friends and family, and a way to connect with people they may have never met IRL.** This is especially true among men compared to women, +15 and +33 percentage points, respectively.

- Snapchat Generation
- Non-Snapchatters



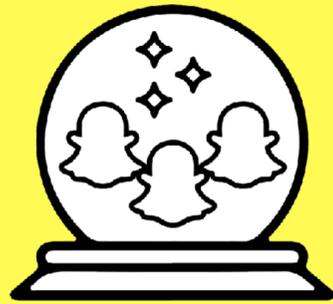
Snapchat Generation
Men: 81%
Women: 66%



Snapchat Generation
Men: 65%
Women: 32%

The Snapchat Generation is 1.8x more likely than non-Snapchatters to gravitate to AR experiences, and 1.4x when it comes to video & mobile games





The Snapchat Generation in the US is defining the future.

With \$1.9 trillion in estimated discretionary spending, the largest of any individual country or region, the Snapchat Generation is one to be reckoned with. Where does your brand stand with the Snapchat Generation?

BECAUSE...

ASK YOURSELF...

They have high aspirations and challenge themselves

How can you help them be their best selves?

They are independent and are change agents

How can you be an ally and activist?

They expect a two-way dialogue

How do you incorporate them into your story?

Methodology

We started with secondary research of **Trendspotting** and a deep dive review of existing insights from **The Cassandra Report®** related to Gen Z attitudes and media consumption habits across the globe in select key markets which informed all parts of this bespoke inquiry.

The Real Story was generated through a 20-minute, online quantitative survey fielded October 15, 2020 – November 30, 2020 in the **US, Mexico, Brazil, UK, France, Germany, Spain, Italy, Netherlands, Norway, Saudi Arabia, UAE, India, Malaysia, Indonesia, Japan, and Australia.**

We interviewed a range of respondents aged 13+ within each country (specific sample sizes are listed in the callouts on the next page); the sample accounted for a mix of age, gender and region (and ethnicity in the US) among those who self-identified as Daily Snapchatters and Non-Snapchatters. **To qualify, respondents had to use Snapchat at least once daily (Daily Snapchatters) or do not have Snapchat downloaded/have never heard of Snapchat (Non-Snapchatters).** During analysis to ensure a representative read on the individual countries, cell weighting based on nested gender and age were applied to each country helping to correct for demographic imbalances due to set sampling sizes. For each country, Snapchat users were weighted based on the combination of their gender (male/female) and age group (13-20 years old, 21-24 years old, 25-34 years old, 35+ years old). For Brazil and Indonesia, due to the set sampling sizes, the age was grouped to 13-34 years old and 35+ years old. Non-Snapchat users were assigned a weight of 1. Regional reports were created based on averaged weighted data across countries included in each region. North America includes US; Europe includes UK, France, Germany, Spain, Italy, Netherlands, Norway; LATAM includes Mexico and Brazil; APAC includes India, Indonesia, Malaysia, Japan, Australia; MENA includes Saudi Arabia and UAE.

Additionally, Daily Snapchatters were recruited within each country to participate in qualitative focus groups and IDIs to showcase their Trendspotting, forward thinking, and to further explore key themes found in the quantitative research.



Thank you!

